

# **Training Session for the Rowan County LTC Planning Initiative**

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# Agenda for the Day

- Introductions
- Planning Basics Notebook - Julie
- Strategic Planning Overview, Identifying and Recruiting Stakeholders, and Increasing Consumer Involvement – Julie
- Working Lunch
- Core Service Evaluation Tools and Matrix - Steve
- Finding and Using Data – Mary Anne

# **Planning Basics Notebook**

**Available on-line at:**

**[www.dhhs.state.nc.us/ltc/localplanning.htm](http://www.dhhs.state.nc.us/ltc/localplanning.htm)**

# Strategic Planning

Vision without action is a dream.

Action without vision is simply  
passing the time.

Action with vision is making a  
positive difference.

Joel Barker

# What is Strategic Planning?

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A journey to create a future that is better than the present.

# Strategic Planning Asks:

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- Where are we now?
- Where do we want to be?
- How do we get there?
- How do we track our progress and measure our success?

# Successful Strategic Planning

- Builds a shared vision across the community
- Is inclusive and participatory
- Looks at both past and future
- Encourages debate and questions the status quo
- Is accountable
- Is based on quality information
- Integrates “hard” and “soft” data
- Flexible and Messy!

# IOM Recommendation 16

- Local planning committees should be required to:
  - Review and analyze service utilization data through county data packages
  - Track the flow of consumers from referral to disposition through core service agencies
  - Determine how to design a uniform portal of entry
  - Determine the need for additional core LTC services
  - Communicate findings to local, state, and federal policymakers



# Steps in Strategic Planning

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Please see page I-9 in the  
Planning Basics Notebook

# 1. Making a Commitment

- ✓ Identify leadership
- ✓ Identify overarching issues
  - Rowan County's*
    1. Accessibility of Information
    2. Advocacy
    3. Affordable Medical Services
    4. Housing
- ✓ Plan for planning
  - ✓ Leadership meets and organizes
  - ✓ Logistics

## 2. Organizing

- ✓ Recruit the team (more later)
- ✓ Create vision/mission
- ✓ Identify planning model
  - ✓ Ground Rules
  - ✓ Leadership positions
  - ✓ Committee structure (standing vs. ad-hoc)
  - ✓ Bylaws
  - ✓ Planning process
  - ✓ Timeline

# Vision and Mission

## Vision

- Defines your dream
- Pushes towards future achievements
- Sees the future as better than the past
- Is short, broad, and energizing

## Mission

- Defines your team's purpose and reason for being
- Elaborates on the Vision
- States what your team exists to do, for whom and where
- Answers why things should change

# Rowan Co.'s Vision and Mission

Vision: Rowan County will be a healthy, safe, and kind community of opportunities for older adults and adults with disabilities

Mission: The Rowan County Planning Initiative seeks to enrich the lives of older adults and adults with disabilities through community collaboration that will:

- Protect health, safety, and independence
- Promote creativity, wellness, and self-determination
- Identify and prioritize needs and resources
- Address needs with established and innovative services/activities
- Deliver services in an efficient and cost effective manner

### 3. Scanning the Environment

- Review trends, demographics, characteristics of services and clients, community assets, and needs
- SWOT
- Gather baseline data (for evaluation later)
- Get community input
- Will likely take time and effort

## 4. Select Key Issues

- Analyze data and community input
- Identify key problems, barriers, gaps, and successes within the overarching issues
- Prioritize areas for change

## 5. Goals, Objectives, Actions Steps, Outcomes, and Outcome Indicators

? Strategies      Objectives  
                         ?  
? Goals      Outcomes  
  
Vision      ?  
                 Mission  
? Action Steps      ?

People often get bogged down and confused by the terms ...instead, think of starting broad and getting more specific as you go further



# Working Definitions for today

**Goals:** Broad, general, long-range statements of what your team wants to accomplish

- Consistent with Vision and Mission
- Realistic yet challenging
- No specific milestones or ways of getting there
- Should not conflict with each other

**Outcomes:** Describes what changes as a result of an intervention, event, or program.

- Change words (e.g. reduces, decreases, increases, eliminates, enhances, forms, creates, develops)
- Measurable and meaningful

# More Definitions

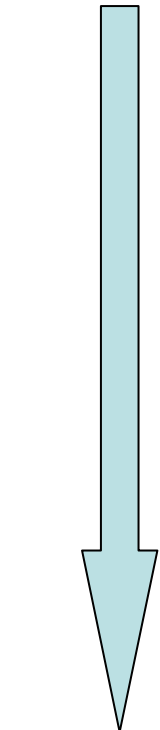
**Objectives:** Steps that will help you achieve your goal and intended outcomes

- SMART – Specific, measurable, attainable, realistic, time-bound
- Ex. By 1/01/06, increase the number of affordable housing units by 20

**Action Steps:** Specific and concrete tasks necessary to accomplish an objective/outcome. Usually several per objective

**Indicators:** Measures that indicate if you have succeeded (e.g. number, percent) in achieving an objective. Every objective should have an indicator.

BROAD



Specific



# Example

Goal: To improve the mental health of older adults and adults with disabilities in Rowan County.

Outcome:

- 25% more older adults and adults with undiagnosed depression in Rowan County will receive treatment

## Example Cont.

Rowan County feels that the people in their county don't really understand depression and its symptoms

### Objective 1:

By March 2006, 1500 older adults, adults with disabilities, and their caregivers will be educated about the symptoms of depression

### Action Steps:

- 15 depression screenings will be held across the county between 2/05 – 6/05 by the Senior Center
- An educational presentation will be conducted at all congregate meal program sites by the Dept. on Aging during FY 05
- A series of articles, co-written by the Mental Health Association, will appear in the *Daily News* during 12/05

# Example Cont.

## Indicators

- % of older adults and adults with disabilities who receive treatment for depression at the Mental Health Association and the Hospital

OR

- The # of older adults and adults with disabilities who receive treatment for depression at the Mental Health Association and the Hospital

## 6. Write the Strategic Plan

- See Chapter 40
- The Strategic Plan can:
  - Guide change in your community for years
  - Evaluate your community's progress in attaining outcomes
  - Communicate and market your team's work and ideas about necessary change
  - Educate the public
  - Identify and recruit additional stakeholders

# Keeping Your Plan off the Shelf...

- Ensure that all planning is inclusive
- Make sure the plan is realistic, flexible, and complete
- Simple language
- Assign responsibilities and timeframes
- Commit to evaluation
- Market the plan to increase accountability



## 7. Implementation

- Publicize the Strategic Plan
- Gain commitment of any key stakeholders not already involved
- Implementation or Strategy Committees?
- Grant writing?
- Evaluation continues

## 8. Monitor/Update

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- Evaluation and Implementation continues
- Publicize results everywhere you can
- Celebrate!



9. Start over!  
It's a cyclical process!

## Keep in Mind...

- The real benefit of strategic planning is the process, not the end result (the plan)
- There is no perfect process
- There is no perfect plan
- Start simple...but keep moving
- The work has only just begun once the plan is written!

# Resources

- University of Kansas' Community Toolbox  
<http://ctb.ku.edu>
- United Way – Outcome Measurement Resource Network  
<http://national.unitedway.org/outcomes/>
- Manageware: A Practical Guide to Managing Results  
[http://www.state.la.us/opb/pub/MW\\_StrategicPlanning.pdf](http://www.state.la.us/opb/pub/MW_StrategicPlanning.pdf)

# Identifying and Recruiting General Stakeholders

People who work together  
will win, whether it be  
against complex football  
defenses or the problems of  
modern society – Vince  
Lombardi

# IOM Recommendation 16

- Older adults
- Disabled adults
- Caregivers
- AAA and its Ombudsman/men
- CAC
- Community leaders
- DSS
- Health Department
- HCCBG lead agency
- CAP-DA lead agency
- Hospitals that serve your residents
- Home health agencies
- Nursing homes and Adult Care Homes
- Assisted living facilities
- ADC/ADH
- Group homes for people with mental illness or developmental disabilities
- Independent living facilities
- Advocates
- Local government

## You may also want to consider...

- Any local agency or group with a “stake” in LTC services or reform
- Media
- Local foundations
- Human resource directors
- Community colleges or Universities
- Faith-based organizations
- Local United Way



## And...

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- Libraries
- Veteran's organizations
- "Baby Boomers"
- Law enforcement and first responders
- City or county planners
- Service organizations
- Others??

# Recruiting Tips

- Get County Commissioner's endorsement
- Develop a contact list and a task list
- Appoint a volunteer coordinator
- Think about ways to “sell” the Initiative and develop a one-pager
- Job descriptions with time and commitment requirements
- Look for skills, not always big names

# Supporting Diversity

- “Having primary and secondary dimensions”
  - Primary (we can’t change): age, race, ethnicity, gender, and sexual orientation
  - Secondary (we have some power to change): religion, education, income, work background, geographical affiliation, marital status, and military service

Loden and Rosener in *Workforce America*, 1991.

- Should strive to include all types primary and secondary dimensions on your team
- Please see section on diversity for strategies

# What Do Volunteers Need?

- Adherence to vision, mission, and ground rules
- Respect for their time
- A “go to” person for help
- Specific, manageable tasks
- Communication
- Opportunities for leadership
- Sufficient information and assistance
- Appreciation
- Sometimes training/orientation

# Resources

“Developing and Managing Volunteer Programs”

[www.mapnp.org/library/staffing/outsourcing/volunteer/volunteer.htm](http://www.mapnp.org/library/staffing/outsourcing/volunteer/volunteer.htm)

“Involving Key Influentials in the Initiative”

[http://ctb.ku.edu/tools/en/sub\\_section\\_main\\_1083.htm](http://ctb.ku.edu/tools/en/sub_section_main_1083.htm)

“Promoting Participation Among Diverse Groups”

[http://ctb.ku.edu/tools/en/sub\\_section\\_main\\_1079.htm](http://ctb.ku.edu/tools/en/sub_section_main_1079.htm)

Institute of Medicine Report

[www.nciom.org/lrcfinal.pdf](http://www.nciom.org/lrcfinal.pdf)

Free Electronic Books on Volunteers (especially note  
“Valuing the Rural Volunteer”)

[www.energizeinc.com/art/electbooks.html](http://www.energizeinc.com/art/electbooks.html)

# Consumer Involvement

Who knows the job better than the man close to it?

– Kimsey Mann

# How do you define “Consumer”?

- “Individual who purchases, uses, and/or maintains products or services” – legal definition
- The IOM report mentions “people age 18 or older using publicly-funded LTC services at the county level” and “older adults and people with physical or cognitive disabilities”
- “A person who may use or need a service” – NC Council on Developmental Disabilities

# Why would you want consumers involved in your Initiative?

- The IOM report encourages it
- Underlying reason for planning processes is to make the “system” better for consumers
- First-hand knowledge of the “system”
- Can be more honest than others
- Often bring lots of energy, creativity, and new ideas
- Are only there if they are interested and believe in the cause
- Accountability
- May have skills not already in network
- May become your biggest advocates!



# How many consumers should your team include?

- Up to you to answer
- Consumers should be represented in all major activities/tasks/groups if possible
- If possible, include consumers in leadership positions

# How do you find willing and able consumers?

## Make consumers a priority

- Get to know your community's consumers
- Consumers must be at the heart of your planning efforts
- Recognize consumers' strengths and match with tasks
- Make the planning process consumer-friendly

## Cont...

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### Recruiting consumers

- Work through service providers, faith community, community groups, etc.
- Attend and present at other meetings
- Post information where consumers go (not just where they go for services)
- Have consumers recruit additional consumers

# Making the planning process consumer-friendly

- Put consumer participation in your vision or mission
- Create a short job description
- Provide an orientation to the committee
- Develop mentoring relationships
- Include consumers in leadership positions
- Get to know each consumer on your team
- Don't become dependent on the "yes" people
- Use person-centered language
- Figure out what motivates each consumer

# Making the planning process consumer-friendly cont.

- Be sensitive to people's special needs concerning:
  - ADA accessibility
  - Transportation
  - Vision or hearing losses
  - Child- or elder-care responsibilities
  - Personal assistants/aides
  - Memory problems
  - Teleconferences
  - Jargon and acronyms
  - Food and drinks
  - Long meetings

## Other Ways to Include Consumer Input in the Planning Process

- Ask them to be featured speakers at a meeting or public event
- Focus groups
- Public forums
- Surveys (written, phone, etc.)
- Anecdotal stories for use in publicity or the strategic plan
- Have ***specific*** and ***finite*** tasks that consumers can help with

# Helpful Resources

Assistive Technology Community Resources

[www.pat.org/ncat.html](http://www.pat.org/ncat.html)

People First: Guide to Understanding  
Developmental Disabilities

[www.nc-ddc.org](http://www.nc-ddc.org), click on “People First”

“Involving People Most Affected by the Problem”  
in the Community Toolbox

[http://ctb.ku.edu/tools/en/sub\\_section\\_main\\_1084.htm](http://ctb.ku.edu/tools/en/sub_section_main_1084.htm)

# In Conclusion

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Any Last Questions?